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Russia's Poultry Imports

The Ministry of Economic Development and Trade distributes 100 percent of the poultry quota and 90 percent of the beef and pork quotas to importers. The quotas are in proportion to 2003 import volumes. The remaining 10 percent of beef and pork quotas are sold at auction. Changes in the mechanism of poultry quota distribution were discussed recently during U.S. negotiations. There have been discussions about auctioning poultry quotas but the Russian importing companies are strongly against any change to the current method of quota distribution.

For the first nine months of 2004, Russia's poultry imports (HS code 0207) fell 10 percent in volume and 8 percent in value when compared to the same period in 2003. Cases of avian influenza in North America and Asia, and foot and mouth disease in Brazil, resulted in Russia banning imports from multiple countries at various times. In March, 2004 Prime Minister Mikhail Fradkov signed a decree that allows importers to have their licenses re-issued if the veterinary service introduces a complete or partial ban on imports of meat from any country that had received a quota. Russia had implemented bans on poultry from Delaware on February 9, Texas in on February 20 and Maryland on March 8. Russia lifted the ban on Delaware on August 30.

Poultry Exports to Russia, Jan – Sept Comparisons

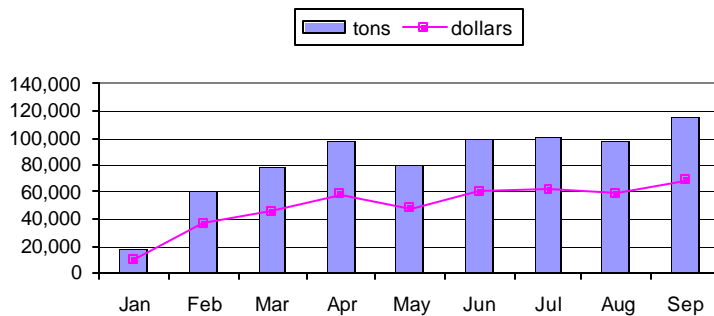
	Metric Tons		'000 Dollars	
	2003	2004	2003	2004
U.S. exports	476,000	496,500	241,800	366,100
Brazil's exports	110,700	138,600	69,300	124,400
*CIS exports	600	100	500	100
*Commonwealth of Independent States				

Brazil's chicken imports to Russia were sharply higher for the first nine months of 2004 compared to the first nine months of 2003. When Russian bans on a few states in the U.S. limited importers' access to U.S. poultry, Brazil provided a ready alternative. Brazil's exports grew 25 percent in volume and 79 percent in value.

Brazil Chicken Exports to Russia

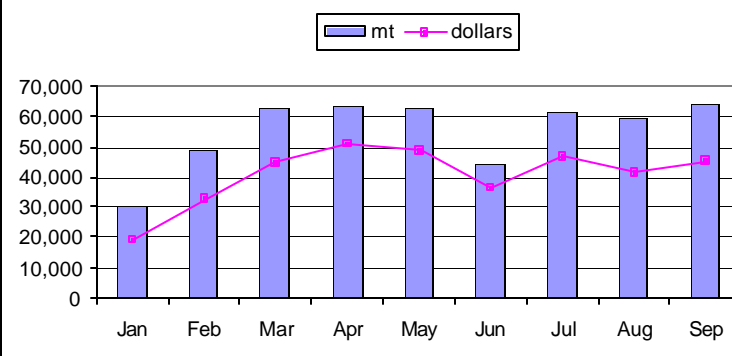
	2004	2004	2003	2,003
	\$	MT	\$	MT
January	2,234	2,927	3,743	6,268
February	3,677	4,486	4,678	7,408
March	11,063	12,440	28,130	50,307
April	12,841	14,766	8,144	13,817
May	22,873	26,367	1,943	3,288
June	19,623	23,417	5,340	9,711
July	21,667	13,619	9,592	8,659
August	27,097	36,035	4,663	7,399
September	3,309	4,572	3,069	3,887
YTD	124,384	138,629	69,302	110,744

Russia's Poultry Imports Jan-Sep 2004



Source: Russia's State Customs Committee

U.S. Poultry Exports to Russia Jan-Sep 2004



Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

Countries such as Argentina, Brazil and Thailand have expressed their discontent with the current quota distribution. Russia has stated the quotas were imposed with full compliance with the WTO rules and they will not make any changes.

During the current Asia Pacific Economic Cooperation (APEC) talks in Chile, Russia agreed to give Thailand a tariff reduction on chicken rather a poultry quota. Russia has never imported chicken from Thailand. Thai officials also discussed a trade of Thai chicken for Russian army planes.

Source: USDA/FAS, USDA/APHIS, Brazil Ministry of Agriculture, Russia's State Customs Committee, Russian Federation Government, news sources

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending November 13, 2004		Year-To-Date		
TYPE	2004	2003 1/	2004 2/	2003
Liquid	661	254	16,141	15,205
Frozen	0	0	36	96
Dried	80	0	684	471
Total	741	254	16,861	15,772

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending November 13, 2004		Year-To-Date		
TYPE	2004	2003 1/	2004 2/	2003
Liquid	128	55	7,287	4,952
Frozen	5	113	1,471	3,297
Dried	63	0	1,956	1,139
Total	196	168	10,714	9,388

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending November 13, 2004		Year-To-Date		
TYPE	2004	2003 1/	2004 2/	2003
Jumbo	0	0	392	437
Extra Large	900	767	161,304	29,420
Large	3,300	5,107	328,644	122,093
Medium	2,571	1,550	112,095	55,926
Ungraded	8,838	3,600	308,224	172,778
Misc	0	0	16,790	14,222
Total	15,609	11,024	927,449	394,876

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 13-Nov-04

(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
Head	1,516	1,534	3,050
Last Week	1,499	1,391	2,890
Same week yr ago	1,126	1,656	2,782
To-date/2004	61,789	61,469	123,258
To-date/2003	64,915	63,622	128,537

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
Head	160	3	163
Last Week	186	0	186
Same week yr ago	0	0	0
To-date/2004	10,819	129	10,948
To-date/2003	10,059	137	10,196

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
Head	1,676	1,537	3,213
Head sltr Comparisons			
Last Week	1,685	1,391	3,076
Same week yr ago	1,126	1,656	2,782
To-date/2004	72,608	61,598	134,206
To-date/2003	74,974	63,759	138,733

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Nov 19, 2004				
<u>CHICKEN</u>				
	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	20.00-21.00	19.00	141,200	-
WTD AVERAGE	20.50	19.00		
15-20%				
RANGE	13.75-21.00	11.00-20.00	2,852,400	2,060,000
WTD AVERAGE	15.90	13.00		
20% OR MORE				
RANGE	-	15.00	122,400	-
WTD AVERAGE		15.00		

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

			Nov 19, 2004	
<u>CHICKEN</u>				
	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

	PRICES	VOLUME
	(Cents per Pound)	

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	18.50	18.75-22.00	540,000	260,000
WTD AVERAGE	18.50	21.07		
15-20%				
RANGE	17.00-22.00	18.00-20.00	2,481,000	2,041,000
WTD AVERAGE	19.51	18.91		
20% OR MORE				
RANGE	-	17.50	200,000	-
WTD AVERAGE		17.50		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 19 NOVEMBER 2004.

The market tone on ton drums and ton full-cut wings was steady to barely steady, ton necks steady at best and ton 2-joint wings most steady. Buyer caution was noted on ton 2-joint wings with some watching for further market developments in December. Offerings of ton joint wings light, but spotty. Offerings on the balance of ton bulk parts ranged from at least adequate on necks to sometimes fully adequate on drums and full-cut wings. Bulk parts supplies were least available from whole turkey processors. The market tone on hen bulk parts ranged from firm on 2-joint wings to barely steady on necks. Demand slow to instances good, best on hen 2-joint wings. Offerings of hen 2-joint wings short of buyers' needs, hen drums light to adequate and hen necks fully adequate. Trading was heavy on fresh white meat for domestic shipments, balance slow. Increased trading was noted on fresh de-trapped tenderloins at both lower trending prices for current shipment and spot premiums noted for early December. For domestic (fresh): scapula 118-122, breast trim 138 cents delivered. For export: fresh thigh meat 88-90, frozen de-trapped tenderloins 180 cents delivered.

FRIDAY, NOVEMBER 19, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	39.00		39.00	40	38.17	240
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		W	24.00	80	24.00	80
MECHANICALLY SEPARATED 2/	21.00		21.00	160	21.92	260
THIGH MEAT - FROZEN	82.00		82.00	52	81.30	980

THURSDAY, NOVEMBER 18, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	38.00		38.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		W	24.00	80
MECHANICALLY SEPARATED 2/		T	21.00	20
THIGH MEAT - FROZEN	81.00		81.00	40

WEDNESDAY, NOVEMBER 17, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	39.00	80
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	24.00		24.00	80
MECHANICALLY SEPARATED 2/		T	21.00	20
THIGH MEAT - FROZEN	81.00-82.00		81.27	300

TUESDAY, NOVEMBER 16, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	39.00		39.00	80
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	24.00	80
MECHANICALLY SEPARATED 2/	21.00		21.00	20
THIGH MEAT - FROZEN	81.00-84.00		82.00	60

MONDAY, NOVEMBER 15, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	37.00		37.00	80
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	24.00	80
MECHANICALLY SEPARATED 2/	24.00		24.00	80
THIGH MEAT - FROZEN	79.00-83.50		81.20	528

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.